

A large, multi-paned window with a wooden frame looks out onto a scenic landscape. The view includes a stone wall, a wooden deck, a body of water, and trees. Inside, a light-colored sofa with cushions is visible in the foreground.

WINDOW MARKET IN POLAND

edition

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INTRODUCTION



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A difficult second half of 2022 and the worst beginning of a season for the Polish window industry since many years ago are behind us. After four months of 2023, the window manufacturing output was over 25% lower than from January to April of the previous year. This is confirmed by managers of manufacturers and component suppliers, who explain the window sales drop with inflation, economic downturn and unavailability of loans. And they are right, because these factors, which are strongly interrelated, contribute to the lack of sense of financial security and consequently to the decisions to refrain from making larger purchases.

Window sales are a victim of this situation. It should be noted that the window manufacturing output in Poland in Q1 2023 was lower not only than in early 2022 but also in comparison with the initial three months in the period 2018–2021. We have struggled with a sales drop in the home market a few times

already. Lately, we have informed you about sales drops in Poland more frequently than about increases. The new situation is that the lower domestic sales have been accompanied by decreased export. The export slowed down considerably already in the second half of the year but the initial months of this year saw quite a big decline for the reality so far.

Many of us wonder what the second half of the year and the next season will bring. Drops, even deep ones, can be survived if they do not maintain for too long. Therefore, we asked 117 professionals associated with the Polish industry, component suppliers, and window manufacturers, what they expect in the coming dozen or so months. We have added a substantial dose of knowledge coming from the economy, the construction industry and the consumer sentiment, and we are presenting the findings in this report in the form of a window sales forecast.

ABOUT THE REPORT

Window market in Poland, edition 2023 is the latest issue of CAB's annual report on the window market. The study is intended to provide manufacturers, suppliers, and distribution companies with comprehensive information about the development of the Polish industry home and abroad.

The report discusses the window industry's performance in 2022 and in early 2023. It also offers a window sales forecast for H2 2023 and for 2024.

The report is composed of 8 chapters, which present:



the macroeconomic environment in which Polish manufacturers operate /**economy, construction industry**/

the **position** of the Polish window and door joinery industry **against other European countries**,



the **window manufacturing** in Poland, its **product** and material **structure**, and results of the **leading manufacturers**,

the Polish window **export** volume, dynamics and directions,



the window **import** results and share of imported windows in the domestic sales,

the **window sales in Poland**, including in **new construction projects** and in the **renovation** market,



changes in prices of commodities in H1 2023. Outlook for changes in window prices in H2 2023.

the **forecast of window sales** by Polish manufacturers for **2023–2024**



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DEFINITIONS

The analysis covers the Polish window market, including façade and roof windows, made of plastic, wood, and metal.

Windows are understood as defined in:

- PKWiU (Polish Classification of Goods and Services): codes 16.23.11-10 (windows, balcony windows and their frames, of wood), 22.23.14-50.01 (plastic windows for the construction industry), 25.12.10-30.02.01 (steel windows), 25.12.10-50.02.01 (windows, skylights, and aluminium illuminators),
- and CN classification: codes 39252000 (plastic joinery), 441810 (wood windows), 73083000 (steel joinery), 76101000 (aluminium joinery).

Data on window manufacturing and foreign trade are collected in various units of measurement (pieces, m², kg). The basic window unit adopted is the O32 window; the data are converted to this window size.

METHODOLOGY

The following research techniques were employed in the project:

- analysis of secondary sources: data from external sources, such as statistical offices, Customs Service, credit agencies, stock exchange reports, press releases, corporate presentations, manufacturers' websites
- own research: two types of own research have been carried out for the purpose of the report:
 - CAWI (Computer-Assisted Web Interview): a survey conducted among window manufacturers and suppliers regarding the companies' performance in 2022. The aim of the survey was to obtain information about sales, export share and manufacturing/sales structure,
 - CATI (Computer-Assisted Telephone Interview): interviews were made with 117 managers from the industry (94 of whom represented window manufacturers and 23 worked in companies supplying components). The respondents were asked to rate the situation in the industry in terms of changes in sales and prices in this season. The managers were also asked about their window sales forecasts for 2023–2024.

An important aspect used to examine the changes in the window market in Poland is an analysis of data obtained from suppliers of window manufacturing materials, including in particular and insulating glass units.

The study uses annual average NBP exchange rates:

- 2017: EUR 1 = PLN 4.2576
- 2018: EUR 1 = PLN 4.2623
- 2019: EUR 1 = PLN 4.2980
- 2020: EUR 1 = PLN 4.4448
- 2021: EUR 1 = PLN 4.5674
- 2022: EUR 1 = PLN 4.6869

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